

Annuity/Pension Exclusion Calculator

(version 7d, 8/4/2016)

Taxpayer's name	Meadows <input type="checkbox"/> Check if a public safety officer pension	
	Enter dates as MM/DD/YYYY	Age at annuity start
Annuity start date	12/01/2013	
Annuitant's birthdate	01/17/1952	61
Spouse's birthdate	03/15/1974	39
Combined age for survivor annuity	Joint or survivor annuity	100
Gross distribution (<input checked="" type="checkbox"/> Check if RRB1099-R)	21570	
Total annuity contributions	38443	
Cost of insurance to exclude	(For pub safety officer use)	Not used
Months received 1st year	1	
Total months to be Excluded	410	
Monthly Exclusion	93.76	
First year Exclusion	94	
Exclusion for Remaining years	1125	
Final year Exclusion (2048)	99	

Form RRB-1099-R

3 Total employee contributions
38443
7 Total Gross Paid
21570
7a Taxable Amount
20445

Simplified General Rule Worksheet

Gross distribution amount (from 1099-R)	21570
Plan cost at annuity start date	38443
Starting date of annuity	12/01/2013
<input checked="" type="checkbox"/> Check here if this is a Joint or Survivor Annuity	
Death benefit exclusion	0
Age of recipient at start date	100
Number of months paid in 20XX	12
Amounts previously recovered	1219

Tax Exclusion Table for Meadows:

Tax Year	Recovered Prior years	Exclusion this year	Remaining cost
2013	0	94	38349
2014	94	1125	37224
2015	1219	1125	36099
2016	2344	1125	34974
2017	3469	1125	33849
2018	4594	1125	32724
2019	5719	1125	31599
2020	6844	1125	30474
2021	7969	1125	29349
2022	9094	1125	28224
2023	10219	1125	27099
2024	11344	1125	25974
2025	12469	1125	24849
2026	13594	1125	23724
2027	14719	1125	22599
2028	15844	1125	21474
2029	16969	1125	20349
2030	18094	1125	19224
2031	19219	1125	18099
2032	20344	1125	16974
2033	21469	1125	15849
2034	22594	1125	14724
2035	23719	1125	13599
2036	24844	1125	12474
2037	25969	1125	11349
2038	27094	1125	10224
2039	28219	1125	9099
2040	29344	1125	7974
2041	30469	1125	6849
2042	31594	1125	5724

2043	32719	1125	4599
2044	33844	1125	3474
2045	34969	1125	2349
2046	36094	1125	1224
2047	37219	1125	99
2048	38344	99	0